

Colorado Medical Assistance Program Web Portal

Data Maintenance User Guide

Sometimes you will need to change (update, add, or delete) the client and provider information or find a provider. These functions are available from the Main Menu of the Portal, on the left side of the screen, under Data Maintenance and Medicaid Provider Lookup.

- [Client Maintenance](#)
- [Provider Maintenance](#)
- [Medicaid Provider Lookup](#)

Client Maintenance

The Client Lookup screen (Figure 1) allows you to:

- Search for a client to either update or delete the client information, or, to see if a client exists in the database before attempting to add it.
- Add a new client.

Client Lookup

State ID	Last Name	First Name	SSN	Date of Birth
12 4		THELMA		11/11/
12 5		MONROE	123-45-6789	11/11/
12 6		WILMA		12/14/
12 9		CHLOE		12/31/

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Search Criteria:
* * *

Add New Client
State ID:

Figure 1 – Client Lookup screen

Using the Display Grid

The display grid in the middle of the screen contains columns of information that can be:

- Sorted – Click on any of the column titles to sort the display grid by that column and click it again to sort it back.
- Scrolled – Click on the [\[Previous Page\]](#) or [\[Next Page\]](#) links below the grid.
- Skipped – Type the screen number in the box below the grid and click **Go** to jump to the screen number specified.

Search for a Client

- Select a column (**State ID**, **Last Name**, **First Name**, **SSN**) in the first search box by using the drop-down button.
- Select a search method (**Exact Match**, **Begins With**, **Contains**) in the second box.
- Type in the characters to search by in the last box (Figure 2).

Department of Health Care Policy and Financing

Related Sites: [Provider Services](#) [CBMS](#) [CHP+](#) [CICP](#) [CPPC](#) [Old Age Pension](#) [HIPAA](#)

[Main](#) [Help](#) [Log Out](#)

Client Lookup

State ID	Last Name	First Name	SSN	Date of Birth
Z 6	HARRISON			12/14/

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Search Criteria:

* * * **Search** **Reset**

Add New Client

State ID: **Add**

Figure 2 – Search example by Last Name beginning with the letter H

- Click on the **Search** button to process your request – the results will appear in the display grid (Figure 3).

Department of Health Care Policy and Financing

Related Sites: [Provider Services](#) [CBMS](#) [CHP+](#) [CICP](#) [CPPC](#) [Old Age Pension](#) [HIPAA](#) [Main](#) [Help](#) [Log Out](#)

Client Lookup

State ID	Last Name	First Name	SSN	Date of Birth
Z 6	HARRISON			12/14/
Z 5	HARRISON		123-45-6789	11/11/
Z 4	HARRISON			11/11/

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Search Criteria:

* * *

Add New Client

State ID:

Figure 3 – Search results

- Click on the **Reset** button to clear the search results and return to the default view of the display grid.

Using the Client Maintenance Screen

There are two ways to open the Client Maintenance screen:

- Perform a search to display the client in the grid and click on the **State ID** link.
 - Enter a new **State ID** in the **State ID** entry box at the bottom of the screen and click on the **Add** button.
- If the client number already exists, an error will display (Figure 4).

The screenshot displays the 'Client Maintenance' interface within the 'Department of Health Care Policy and Financing' system. The header includes the Colorado state seal and navigation links like 'Main', 'User Guide', 'Help', and 'Log Out'. The form fields include 'State ID' (with 'Z 1' entered), 'DOB' (with '06/15/' entered), 'Last Name' (with 'HARRISON' entered), 'First Name', 'Middle Initial', 'SSN', 'Patient Account Number', 'Address', 'City', 'State' (with 'CO' selected), and 'Zip Code'. An error message box from 'Microsoft Internet Explorer' is overlaid on the form, stating 'Record already exists in the database for this State ID' with an 'OK' button. At the bottom right, there are 'Save', 'Cancel', and 'Delete' buttons.

Figure 4 – Error message when adding a new client when the client number already exists

- Click on the **OK** button.
- Click on the **Cancel** button to return to the Client Lookup screen. The information for the existing client will not be changed.

The Client Maintenance screen allows you to update or delete client information or add the required information for a new client in the database.

- If updating the client information, make the necessary changes in the entry boxes and click on the **Save** button (Figure 5).

The screenshot shows the 'Client Maintenance' screen. At the top is a blue header with the 'STATE OF COLORADO' seal on the left and the text 'Department of Health Care Policy and Financing' on the right. Below the header is a navigation bar with links: 'Related Sites:', 'Provider Services', 'CBMS', 'CHP+', 'CICP', 'CPPC', 'Old Age Pension', 'HIPAA', 'Main', 'User Guide', 'Help', and 'Log Out'. The main content area is titled 'Client Maintenance' and contains various input fields for client information. The fields are arranged in two columns. The left column includes 'State ID:*' (text box), 'Last Name:*' (text box), 'SSN:' (text box), 'Patient Account Number:' (text box), 'Address:*' (two stacked text boxes), 'City:*' (text box), and 'State:*' (dropdown menu). The right column includes 'DOB:*' (text box), 'First Name:*' (text box), 'Middle Initial:' (text box), 'Gender:' (dropdown menu), and 'Medicare Number:' (text box). At the bottom right of the form are three buttons: 'Save', 'Cancel', and 'Delete'.

Client Maintenance

State ID:* DOB:*

Last Name:* First Name:*

SSN: Middle Initial:

Patient Account Number: Gender:

Address:* Medicare Number:

City:*

State:* Zip Code:*

Figure 5 – Client Maintenance screen open for editing

- If deleting the client, click the **Delete** button. A delete confirmation box will appear (Figure 6). Click on **Ok** to process the request.

The screenshot shows a web application interface for the Department of Health Care Policy and Financing. The header includes the state seal of Colorado and navigation links. The main content area is titled 'Client Maintenance' and contains a form for client information. A modal dialog box is open, asking for confirmation to delete the record.

Department of Health Care Policy and Financing

Related Sites: [Provider Services](#) [CBMS](#) [CHP+](#) [CICP](#) [CPPC](#) [Old Age Pension](#) [HIPAA](#)

[Main](#) [User Guide](#) [Help](#) [Log Out](#)

Client Maintenance

State ID: * DOB: *

Last Name: * First Name: *

Middle Initial:

SSN:

Patient Account Number:

Address: *

City: *

State: * Zip Code: *

Microsoft Internet Explorer

Are you sure you want to delete the record?

Figure 6 – Delete confirmation box

- A previously deleted client may be restored to the database. To restore a deleted client, enter the **State ID** in the **State ID** entry field on the Client Lookup screen and click the **Add** button. The system will respond by displaying the deleted client information with a dialog box confirming the restoration of the record (Figure 7). To restore the client, click on the **OK** button. Click on **Cancel** to keep the client deleted.

The screenshot displays the 'Client Maintenance' interface within the 'Department of Health Care Policy and Financing' system. The header includes the state seal and navigation links. The form contains fields for State ID (Z 6), DOB (01/01/), Last Name (HARRISON), First Name, Middle Initial, SSN, Patient Account Number, Address, City, State (CO), and Zip Code. A 'Microsoft Internet Explorer' dialog box is overlaid, asking 'This record has been deleted. Do you want to restore the record?' with 'OK' and 'Cancel' buttons. At the bottom are 'Save', 'Cancel', and 'Delete' buttons.

Department of Health Care Policy and Financing

Related Sites: Provider Services CBMS CHP+ CACP CPPC Old Age Pension HIPAA

Main User Guide Help Log Out

Client Maintenance

State ID:* Z 6 DOB:* 01/01/

Last Name:* HARRISON First Name:*

Middle Initial:

SSN: Patient Account Number:

Address:*

City:*

State:* CO Zip Code:*

Microsoft Internet Explorer

? This record has been deleted. Do you want to restore the record?

OK Cancel

Save Cancel Delete

Figure 7 – Restoring a deleted client

- If adding a new client, enter the **State ID** in the **State ID** field on the Client Lookup screen and click on the **Add** button. Enter the required information on the Client Maintenance screen and click on the **Save** button. Although not required in the Client Maintenance screen, assign a **Patient Account Number** due to it being required when submitting claims. If errors are encountered when the **Save** button is clicked, the errors will display in red at the top of the screen (Figure 8). Correct the errors and click on the **Save** button.

Department of Health Care Policy and Financing

Related Sites: [Provider Services](#) [CBMS](#) [CHP+](#) [CICP](#) [CPPC](#) [Old Age Pension](#) [HIPAA](#)

[Main](#) [User Guide](#) [Help](#) [Log Out](#)

Client Maintenance

- Last name must be entered
- Address Line 1 must be entered
- First name must be entered
- City must be entered
- Zip Code must be entered
- Date of Birth (MM/DD/YYYY) must be entered

State ID:* DOB:*

Last Name:* First Name:*

Middle Initial:

SSN: Gender:

Patient Account Number: Medicare Number:

Address:*

City:*

State:* Zip Code:*

Figure 8 – Possible errors when saving a new client

- Click on the **Cancel** button if you want to return to the Client Lookup screen and not change or save the client information.

Provider Maintenance

The Provider Lookup screen (Figure 9) allows you to:

- Search for a provider to either update or delete the provider information or to see if a provider exists in the database before attempting to add it
- Add a new provider

Department of Health Care Policy and Financing

Related Sites: [Provider Services](#) [CBMS](#) [CHP+](#) [CICP](#) [CPPC](#) [Old Age Pension](#) [HIPAA](#)

[Main](#) [Help](#) [Log Out](#)

Provider Lookup

Provider ID	Type	Name
000005	Individual	K [REDACTED] MD, S [REDACTED]
000004	Individual	S [REDACTED], D [REDACTED]
000000	Individual	A [REDACTED], D [REDACTED]
000003	Individual	H [REDACTED], S [REDACTED]
000000	Organization	[REDACTED] CLINIC
000007	Organization	[REDACTED] REGIONAL CENTER
000002	Individual	J [REDACTED], M [REDACTED]
000001	Individual	C [REDACTED], C [REDACTED]
000007	Organization	[REDACTED] HOSPITAL
000006	Individual	C [REDACTED], B [REDACTED]

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Search Criteria:

* * * [Search](#) [Reset](#)

Add New Provider

Provider ID: [Add](#)

Figure 9 – Provider Lookup screen

Using the Display Grid

The display grid in the middle of the screen contains columns of information that can be:

- Sorted – Click on any of the column titles to sort the display grid by that column and click it again to sort it back.
- Scrolled – Click on the [\[Previous Page\]](#) or [\[Next Page\]](#) links below the grid.
- Skipped – Type the screen number in the box below the grid and click **Go** to jump to the screen number specified.

Search for a Provider

- Select a column (**Provider ID**, **Type**, **Name**) in the first search box by using the drop-down button.
- Select a search method (**Exact Match**, **Begins With**, **Contains**) in the second box.
- Type in the characters you want to search in the last box (Figure 10).



Department of Health Care Policy
and Financing

Related Sites:
 [Provider Services](#)
[CBMS](#)
[CHP+](#)
[CICP](#)
[CPPC](#)
[Old Age Pension](#)
[HIPAA](#)

[Main](#)
[Help](#)
[Log Out](#)

Provider Lookup

Provider ID	Type	Name
05	Individual	K MD, S
04	Individual	S , D
00	Individual	A , D
03	Individual	H , S
00	Organization	CLINIC
07	Organization	REGIONAL CENTER
09	Individual	J , M
01	Individual	C , C
07	Organization	HOSPITAL
06	Individual	C , B

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Search Criteria:

* Provider ID
 * Begins With
 * 050
 Search
 Reset

Add New Provider

Provider ID:
 Add

Figure 10 – Search example by Provider ID beginning with 050

- Click on the **Search** button to process your request – the results will appear in the display grid (Figure 11).

Department of Health Care Policy and Financing

Related Sites: [Provider Services](#) [CBMS](#) [CHP+](#) [CICP](#) [CPPC](#) [Old Age Pension](#) [HIPAA](#)

[Main](#) [Help](#) [Log Out](#)

Provider Lookup

Provider ID	Type	Name
050000	Organization	HEALTH
050004	Organization	HOSPITAL
050003	Organization	HOSPITAL ASSOC
050002	Organization	HOSPITAL
050000	Organization	HOSPITAL DIST
050008	Organization	REG MED CN
050006	Organization	INC
050002	Organization	HEALTH AND HOSP
050006	Organization	DBA
050003	Organization	HOSPITAL CENTRAL

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Search Criteria:

* * *

Add New Provider

Provider ID:

Figure 11 – Search results

- Click on the **Reset** button to clear the search results and return to the default view of the display grid.

Using the Provider Maintenance Screen

There are two ways to open the Provider Maintenance screen:

- Perform a search to display the provider in the grid and click on the **Provider ID** link.
- Enter a new **Provider ID** in the **Provider ID** entry box at the bottom of the screen and click on the **Add** button. If the provider number already exists, an error will display (Figure 12).

The screenshot displays the 'Provider Maintenance' screen within the 'Department of Health Care Policy and Financing' web application. The header includes the State of Colorado seal and navigation links for 'Related Sites', 'Provider Services', 'CBMS', 'CHP+', 'CICP', 'CPPC', 'Old Age Pension', and 'HIPAA'. Below the header, the 'Provider Maintenance' section contains input fields for 'Provider ID' (12345678), 'Type' (Individual selected), 'Last Name' (TEST), and 'Organization Name'. A Microsoft Internet Explorer error dialog box is overlaid on the form, displaying a yellow warning icon and the message: 'Record already exists in the database for this Provider ID'. Below the error message is an 'OK' button. The 'Provider Identifier' section below the error message includes a red instruction: 'If required, please enter the National Provider Identifier'. It features an 'ID Qualifier' dropdown menu set to 'Social Security Number' and an 'ID' field containing '123-45-7896'. At the bottom, a note states: 'Note: Address, City, State and Zip Code are required when the Provider is Billing or Service Facility'. Below this note are two checkboxes: 'Billing' and 'Service Facility'.

Figure 12 – Error message when adding a new provider when the provider number already exists

- Click on the **OK** button.
- Click on the **Cancel** button to return to the Provider Lookup screen. The information for the existing provider will not be changed.

The Provider Maintenance screen allows you to update or delete provider information or add the required information for a new provider in the database.

- If you are updating the provider information, make the necessary changes in the entry boxes and click on the **Save** button (Figure 13).

Department of Health Care Policy and Financing

Related Sites: [Provider Services](#) [CBMS](#) [CHP+](#) [CICP](#) [CPPC](#) [Old Age Pension](#) [HIPAA](#)

[Main](#) [Help](#) [Log Out](#)

Provider Maintenance

Provider ID:

Type: ☒ Individual ☐ Organization

Last Name: First Name:

Organization Name:

Provider Identifier

If required, please enter the National Provider Identifier

ID Qualifier: ID:

Note: Address, City, State and Zip Code are required when the Provider is Billing or Service Facility

Categories: ☐ Billing ☐ Service Facility

Address:

City:

State: Zip Code:

Contact Information

Name:

Figure 13 – Provider Maintenance screen open for editing

- If deleting the provider, click the **Delete** button. A delete confirmation box will appear (Figure 14). Click on **OK** to process the request.

The screenshot shows a web application interface for the Department of Health Care Policy and Financing. The header includes the state seal of Colorado and navigation links for Related Sites, Provider Services, CBMS, CHP+, CIP, CPPC, Old Age Pension, and HIPAA. Below the header, the 'Provider Maintenance' section contains fields for Provider ID (12345678), Type (Individual selected), Last Name (TEST), First Name (TEST), and Organization Name. A 'Provider Identifier' section follows, with a note about the National Provider Identifier and fields for ID Qualifier (Social Security Number) and ID (123-45-7896). A note states that address, city, state, and zip code are required for billing or service facilities. The 'Contact Information' section has fields for Name and a dropdown menu. At the bottom, there are 'Save', 'Cancel', and 'Delete' buttons. A 'Microsoft Internet Explorer' dialog box is overlaid on the form, asking 'Are you sure you want to delete the record?' with 'OK' and 'Cancel' buttons.

Department of Health Care Policy and Financing

Related Sites: Provider Services CBMS CHP+ CIP CPPC Old Age Pension HIPAA

Main Help Log Out

Provider Maintenance

Provider ID: 12345678

Type: ☒ Individual ☐ Organization

Last Name: * TEST First Name: * TEST

Organization Name:

Provider Identifier

If required, please enter the National Provider Identifier

ID Qualifier: * Social Security Number ID: * 123-45-7896

Note: Address, City, State and Zip Code are required when the Provider is Billing or Service Facility

Categories: ☐ Billing ☐ Service Facility

Address:

City:

State: CO Zip Code:

Contact Information

Name:

Save Cancel Delete

Microsoft Internet Explorer

Are you sure you want to delete the record?

OK Cancel

Figure 14 – Delete confirmation box

- A previously deleted provider may be restored to the database. To restore a deleted provider, enter the **Provider ID** in the **Provider ID** entry field on the Provider Lookup screen and click the **Add** button. The system will respond by displaying the deleted provider information with a dialog box confirming the restoration of the record (Figure 15). To restore the provider, click on the **OK** button. Click on **Cancel** to keep the provider deleted.

Department of Health Care Policy and Financing

Related Sites: [Provider Services](#) [CBMS](#) [CHP+](#) [CICP](#) [CPPC](#) [Old Age Pension](#) [HIPAA](#)

[Main](#) [Help](#) [Log Out](#)

Provider Maintenance

Provider ID:

Type: * ☒ Individual ☐ Organization

Last Name: * First Name: *

Organization Name:

Microsoft Internet Explorer

?

This record has been deleted. Do you want to restore the record?

Provider Identifier

If required, please enter the National Provider Identifier

ID Qualifier: * ID: *

Note: Address, City, State and Zip Code are required when the Provider is Billing or Service Facility

Categories: ☐ Billing ☐ Service Facility

Address:

City:

State: Zip Code:

Figure 15 – Restoring a deleted provider

- If adding a new provider, enter the **Provider ID** in the **Provider ID** field on the Provider Lookup screen and click the **Add** button. Enter the required information on the Provider Maintenance screen and click on the **Save** button. If errors are encountered when the **Save** button is clicked, the errors will display in red at the top of the screen (Figure 16). Correct the errors and click on the **Save** button.

The screenshot shows the 'Provider Maintenance' screen of the Department of Health Care Policy and Financing. At the top, there is a header with the state seal and navigation links. Below the header, a list of error messages is displayed in red text:

- First name must be entered
- Last name must be entered
- Secondary ID Qualifier must be selected.
- Secondary ID must be entered

The form fields are as follows:

- Provider ID:** A text box containing '99999999'.
- Type:** Radio buttons for 'Individual' (selected) and 'Organization'.
- Last Name:** A text box with a red asterisk indicating it is required.
- First Name:** A text box with a red asterisk indicating it is required.
- Organization Name:** A text box.

Below the form fields, there is a section titled 'Provider Identifier' with a note: 'If required, please enter the National Provider Identifier'. It includes a dropdown for 'ID Qualifier' and a text box for 'ID'.

A note states: 'Note: Address, City, State and Zip Code are required when the Provider is Billing or Service Facility'. Below this, there are checkboxes for 'Billing' and 'Service Facility'. The form fields for address information are:

- Address:** Two stacked text boxes.
- City:** A text box.
- State:** A dropdown menu showing 'CO'.
- Zip Code:** A text box.

At the bottom, there is a section titled 'Contact Information' with a text box for 'Name' and a dropdown menu. At the very bottom, there are three buttons: 'Save', 'Cancel', and 'Delete'.

Figure 16 – Possible errors when adding a new provider

- Click on the **Cancel** button if you want to return to the Provider Lookup screen and not complete the request.

Medicaid Provider Lookup

The Medicaid Provider Lookup (Figure 17) allows you to query the most recent MMIS provider file to view provider information. Although you are not required to restrict your results using a search, it is recommended as the system will display the entire MMIS provider file if the **Search** button is clicked and no search criteria has been specified.

Department of Health Care Policy and Financing

Related Sites: [Provider Services](#) [CBMS](#) [CHP+](#) [CACP](#) [CPPC](#) [Old Age Pension](#) [HIPAA](#)

[Main](#) [Help](#) [Log Out](#)

Medicaid Provider Lookup

General Criteria:

Provider Type:

Provider's Last Name or Clinic Name Begins With:

Location Criteria:

City:

State:

Zip:

County:

Specialty Criteria:

- Adolescent Medicine
- Adult Day Service
- Allergy
- Allergy, Pediatric
- Anesthesiology
- BI Adult Day Service
- BI Assistive Technology
- BI Behavioral Programming
- BI Day Treatment
- BI Indep Living Skills Train
- BI Institutional Respite Care
- BI Mental Health Counseling
- BI Personal Care Service
- BI Respite Care
- BI Substance Abuse Counseling
- BI Supported Living Program

To Select Multiple Specialties, hold down the CTRL key.

This lookup contains providers enrolled with Medicaid; it does not identify providers who are currently accepting new patients.

12 per page

Figure 17 – Provider Specialty Lookup screen

To search for providers, three types of search criteria sections are provided. You can use all three at the same time or any combination of the three. The search criteria sections are:

General Criteria: This section provides for a search by **Provider Type** and the **Provider's Last Name or Clinic Name Begins With**.

Location Criteria: This section provides for a search by **City**, **State**, **Zip Code**, and **County**.

Specialty Criteria: This section provides for a search based on **Specialty**. Multiple specialties can be searched for at the same time by holding down the **Ctrl** key and clicking on the specialties needed.

If a specific **Provider Type** is selected from the drop-down box, the specialties listed in the **Specialty Criteria** box will change to match the **Provider Type** chosen (Figure 18).

Department of Health Care Policy and Financing

Related Sites: Provider Services CBMS CHP+ CACP CPPC Old Age Pension HIPAA Main Help Log Out

Medicaid Provider Lookup

General Criteria:

Provider Type: **Dentist**

Provider's Last Name or Clinic Name Begins With:

Location Criteria:

City:

State: **Colorado**

Zip:

County: **--No Preference--**

Specialty Criteria:

- Cardiology/Cardiovascular Disease
- Dental, Family Practitioner
- Dental-General Practitioner
- Dental-Hygienist
- Direct Pay
- General Practice
- Indirect Pay
- Internal Medicine
- Oral Surgeon (Dentists)
- Orthodontia
- Pediatric Dentist
- Pediatrics
- Periodontics
- Prosthodontics
- Surgery, Oral & Maxillofacial

To Select Multiple Specialties, hold down the CTRL key.

This lookup contains providers enrolled with Medicaid; it does not identify providers who are currently accepting new patients.

12 per page Search Reset

Figure 18 – Dental Provider Type with Dental specialties

If the search criteria you specify does not find any matching providers, a message will be displayed in red on the criteria screen stating that no providers matched (Figure 19).

The screenshot shows the 'Medicaid Provider Lookup' page from the Colorado Department of Health Care Policy and Financing. The page header includes the state seal and navigation links. The search criteria are as follows:

Criteria Type	Field	Value
General Criteria:	Provider Type:	Community Mntl Hlth Center
	Provider's Last Name or Clinic Name Begins With:	MIHALEK
Location Criteria:	City:	
	State:	Colorado
	Zip:	
	County:	--No Preference--

Specialty Criteria: [Empty box]

To Select Multiple Specialties, hold down the CTRL key.

No providers matched your criteria. Please try again.

This lookup contains providers enrolled with Medicaid; it does not identify providers who are currently accepting new patients.

12 per page [Search] [Reset]

Figure 19 – Search resulting in no matching providers

Revise your search criteria and click on the **Search** button again to obtain new results.

The Provider Specialty Listing will display in a columnar format with the provider name, address and phone numbers (Figure 20).

STATE OF COLORADO
1876

Department of Health Care Policy and Financing

Related Sites: [Provider Services](#) [CBMS](#) [CHP+](#) [CICP](#) [CPPC](#) [Old Age Pension](#) [HIPAA](#)

[Main](#) [Help](#) [Log Out](#)

Medicaid Provider Report

ALPINE SURGERY CENTER LLC
Ambulatory Surgical Center
Orthopedics
112 WEST SPENCER AVE STE B
GUNNISON , CO - 81230
Gunnison County
(970) 641-6788

This lookup contains providers enrolled with Medicaid; it does not identify providers who are currently accepting new patients.

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Figure 20 – Provider Specialty Listing

The list can be scrolled through by using the scroll bar located at the right of the screen, when applicable. Located at the bottom of the screen are navigational buttons and links to assist with paging through results and obtaining printed output of the listing. Click on the **Print** button to send the list to the printer. To return to the Provider Specialty Lookup screen, click on the **Back** button.